

AIR FORCE SERVICES AGENCY

Program Training Aid

CL-14

Date: Mar 01

Procedures for Transfer of Club Membership

1. PURPOSE: This program training aid explains responsibilities and procedures for helping club members transfer their membership upon PCS, relocation, or retirement. It provides detailed information on how to electronically transfer club members from one installation to another via Club Works.

2. GOALS: To meet the expectation of members for a “seamless” transfer of membership from one base to another, and to provide a tangible incentive to help retain club members when they PCS, relocate, or retire.

3. SCOPE: The information in this training aid is for use by all personnel processing club membership via Club Works. The instructions are provided as an “addendum” to information contained in Club Works User’s Guide to clarify the procedures all bases should be using to transfer members. It includes instructions that must be used by the “losing” base to initiate the member transfer and the procedures used by the “gaining” base to complete the transfer.

4. PROCEDURE: One of the most important responsibilities we have to club members is to insure that when they PCS from one installation to another, their club membership is also transferred accurately and in a timely manner. Members no longer need to resign their membership at one club and then reapply/join the club at their new assignment. With the advent of Club Works, we now have the capability to electronically transfer club membership worldwide. Transferring a member is a two-step process and a joint responsibility between the “losing” and “gaining” bases.

Club membership is transferred via Club Works. Club Works is an Internet system used for processing club membership card transactions in both real-time and batch, as well as reporting functionality. While Club Works was designed to support club membership by providing the capability of applying for a new club membership card over the Internet, accessing dues, and billing charges, this training aid addresses the membership transfer function only. The losing base starts the transfer by “pushing” the member to a “gaining” base, and the gaining base assigns the member to the new club and removes the losing base’s dues, thus completing the transfer. When a base transfers a member, they should not waive their dues as the member retains full membership benefits and privileges during a PCS move. Therefore, they should continue to pay dues to the “losing club” until such time as the “gaining club” assigns a new dues plan and the membership transfer is completed.

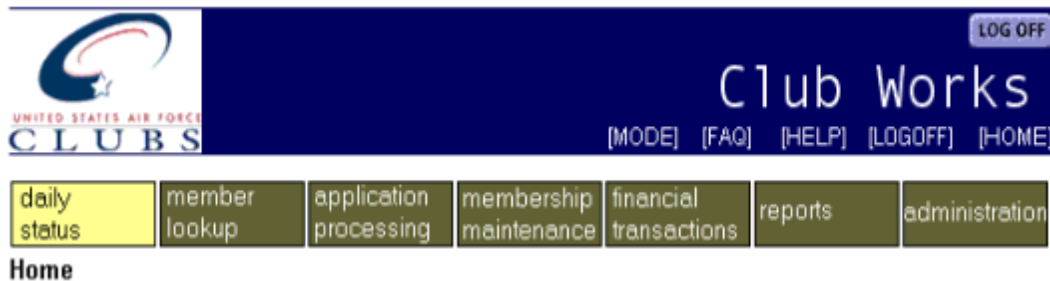
Note: Supercedes CL-14 dated Dec 99



Club Membership Transfer

To transfer a member via Club Works, the following procedures should be used:

Note: Effective with the deployment of Club Works 2.0 in May 01, entering the SSN will be a new requirement to transfer accounts "IN" to a base. This will insure the correct member is being transferred and provide additional security verification.



To initiate the transfer, the "losing" base should:

- Log on to Club Works
- Click on Member Maintenance

Home > Membership Maintenance

Membership Maintenance

[Modify Existing Member](#)

[Transfer Member](#)

- Click on Transfer Member

Home > Member Maintenance > Transfer Member

TRANSFER MEMBER

Account Number:

- Enter the member's account number and click on Search or hit the Enter key

TRANSFER MEMBER	
First Name:	CHRIS
Last Name:	PUBLIC
Account Number:	5428000000000000
Current Installation:	XXXXXXXX
Transfer To Installation:	<input type="text" value="Select Item"/>
<input type="button" value="Complete Transfer >>"/>	

- Enter the base in the “Transfer To Installation” box by clicking on the drop down arrow and selecting the appropriate installation
- Click the “Complete Transfer” button



[LOG OFF](#)
Club Works
[\[MODE\]](#) [\[FAQ\]](#) [\[HELP\]](#) [\[LOGOFF\]](#) [\[HOME\]](#)

daily status	member lookup	application processing	membership maintenance	financial transactions	reports	administration
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Home > Member Maintenance > Transfer Member

TRANSFER MEMBER	
First Name:	CHRIS
Last Name:	PUBLIC
Account Number:	5428000000000000
Social Security Number:	000000000
Address 1: *	36 NASHOBA DR
Address 2:	
City: *	MARLBOROUGH
State/Province: *	MASSACHUSETTS
Zip Code: *	11111111
<div style="background-color: #cccccc; padding: 5px; display: inline-block;">Complete Address Change for Transferred Member</div>	

- The Transfer Member screen will appear –(note that you can only change the white fields)
- Change the address if known
- Click the “Complete Address for Transferred Member” button to complete the transfer



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daily status	member lookup	application processing	membership maintenance	financial transactions	reports	administration
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Home > Membership Maintenance

Member successfully transferred!!

Membership Maintenance

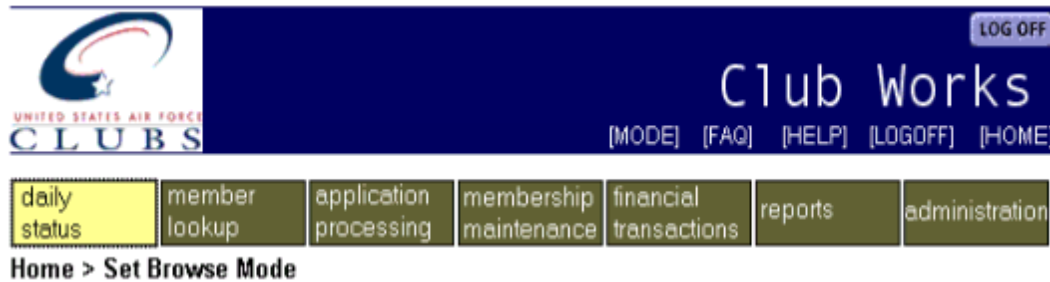
[Modify Existing Member](#)

[Transfer Member](#)

- You will be returned to the “Membership Maintenance” screen – a “Member Successfully Transferred” message will be displayed on the screen

- This completes the procedures to initiate the transfer to be performed by the losing base

(Note: The above instructions can be found on pages 3-25 and 3-26 of the Club Works User's Guide.)



To complete the transfer, the “gaining” base should:

Once the “losing” base has successfully transferred the member, the “gaining” base will receive notification of the transfer in the “Transfers” section of the “Daily Status Report” in Club Works.

- Click on “Daily Status”

Club Works Daily Status

APPLICATIONS	
No incomplete applications to be submitted.	
2 pending applications.	
7 rejected applications.	
Click here to Check Status of Application	
TRANSFERS	
6 transfers to be accepted.	
GREGORY	, 5471000000000000
JEFFREY	, 5471000000000000
J	, 5471000000000000
RODNEY	, 5428000000000000
MICHEL	, 5428000000000000
BENJAMIN	, 6030000000000000

In the Transfers section, note that all members being transferred in to the club are listed along with their account number.

TRANSFERS	
6 transfers to be accepted.	
GREGORY	, 5471000000000000
JEFFREY	, 5471000000000000
J	, 5471000000000000
RODNEY	, 5428000000000000
MICHEL	, 5428000000000000
BENJAMIN	, 6030000000000000
4 members were transferred from this installation.	
EDWARD	, 5471000000000000
RICHARD	, 5428000000000000
DUSTY	, 6030000000000000
MICHAEL	, 6030000000000000
Click here to go the Transfer Member function to finish the transfer.	
Remember to deactivate the old clubs from the transferred member !! Click on the above link to do so.	

To complete the transfer, scroll to the bottom of the listing -- you will find “Click here to go to the [Transfer Member](#) function to finish the transfer.”

The screenshot shows the top of the Club Works web application. On the left is the United States Air Force Clubs logo. To the right, the text "Club Works" is displayed in a large font, with a "LOG OFF" button in the top right corner. Below the header is a navigation bar with buttons for "daily status", "member lookup", "application processing", "membership maintenance", "financial transactions", "reports", and "administration". At the bottom of this bar is the breadcrumb trail: "Home > Member Maintenance > Club Information".

UNITED STATES AIR FORCE
CLUBS

LOG OFF

Club Works

[MODE] [FAQ] [HELP] [LOGOFF] [HOME]

daily status member lookup application processing membership maintenance financial transactions reports administration

Home > Member Maintenance > Club Information

The screenshot shows a form titled "SEARCH FOR MEMBER". It has a "Search By:" label followed by a dropdown menu currently showing "Account Number". Below the dropdown is a text input field. To the right of the input field is a "Search" button. A dropdown menu is also visible below the "Search By:" label, showing options: "Account Number", "Last Name", and "Social Security Number".

SEARCH FOR MEMBER

Search By: Account Number

Account Number
Last Name
Social Security Number

Search

Clicking on the “Transfer Member” brings up the “Search For Member” screen.

- Enter the account number of the member to be transferred (remember, the account number was provided on the “transfer in” screen) – that will bring up the “Club Information Screen.” Make sure you key in the 16 digit account number -- do not try to “copy/paste” it from the Daily Transfer screen as that will not work.
- Click on “Search”

PERSONAL INFORMATION

First Name: JOHN

Middle Initial: Q

Last Name: PUBLIC

Social Security #: 000000000

Account Number: 5428 000000000000

CLUB INFORMATION

☐ ENROLL IN: YYYYYYYYYYYYYY CLUB (To cancel membership, remove checkmark)

Dues Plan	Frequency	Waive Dues	Club Join Date	Dues	Dues Begin Date
<input type="radio"/> Plan 1	QUARTERLY	No	<input type="text"/>	\$18.00	<input type="text"/>
<input type="radio"/> Plan 2	SEMI-ANNUALLY	No	<input type="text"/>	\$36.00	<input type="text"/>
<input type="radio"/> Plan 3	ANNUALLY	No	<input type="text"/>	\$72.00	<input type="text"/>
<input checked="" type="radio"/> Plan 4	MONTHLY	No	<input type="text"/>	\$6.00	<input type="text"/>
<input type="radio"/> Other	<input type="text" value="Select Item"/>	<input type="text" value="Select Item"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

☐ ENROLL IN: YYYYYYYYYYYYYY O' CLUB (To cancel membership, remove checkmark)

Dues Plan	Frequency	Waive Dues	Club Join Date	Dues	Dues Begin Date
<input type="radio"/> Plan 1	QUARTERLY	No	<input type="text"/>	\$36.00	<input type="text"/>
<input type="radio"/> Plan 2	SEMI-ANNUALLY	No	<input type="text"/>	\$72.00	<input type="text"/>
<input type="radio"/> Plan 3	ANNUALLY	No	<input type="text"/>	\$144.00	<input type="text"/>
<input checked="" type="radio"/> Plan 4	MONTHLY	No	<input type="text"/>	\$12.00	<input type="text"/>
<input type="radio"/> Other	<input type="text" value="Select Item"/>	<input type="text" value="Select Item"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

☒ ENROLL IN: ZZZZZZ ENL CLUB (To cancel membership, remove checkmark)

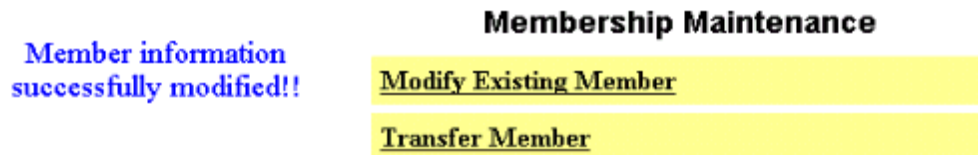
Dues Plan	Frequency	Waive Dues	Club Join Date	Dues	Dues Begin Date
-		Yes	03/20/2000	\$0.00	03/31/2000

- Enroll the transferee in the appropriate club by entering a check mark in the box next to “Enroll In” (clicking once on the box will enter the checkmark)
- Set up the dues plan by clicking on the appropriate radio button
- Enter the “Club Join Date” and the “Dues Begin Date” (**Note:** The dues begin date should be set to the last day of the current month – i.e., if the club join date is 22 Dec 2001, the dues begin date should be 12/31/2001)
- Scroll to the bottom of the page – note that the “losing” club is listed

- Deselect the member from the “losing” club by removing the checkmark in the box next to the club (clicking once on the box will remove the checkmark)

[Note: Failure to deselect the member from his/her previous club will result in “stacked dues,” i.e., the member will be double billed dues from both the losing and gaining bases.]

- Once you have enrolled the transferee in the appropriate club, assigned a dues plan, entered a club join date and a dues start date, and deselected the member from his/her previous club, click on the “Submit” button.



- “Member information successfully modified!!” will be displayed on your screen
- This completes the transfer by the “gaining” base

There could be an instance where the “losing” base does not initiate the transfer of the member from one base to another. When this occurs, the “gaining” base can accomplish the transfer by performing both procedures outlined above. First use the “Transfer Member” function under Membership Maintenance to transfer the member from his/her previous base to your base (you must have the member’s full 16 digit account number to perform the transfer). That will result in the member showing up in your “Transfer In” section of your Daily Status Report. Then simply complete the transfer as described above by assigning them to the appropriate club, setting up their dues, and deselecting them from their previous club.

Transferring a member from one installation to another should involve more than just the transfer itself. Completing the transfer of a new member provides us an excellent marketing opportunity – an opportunity to provide enhanced customer service to the member. We highly recommend and encourage you to take the opportunity to personally

contact the new member and welcome them to “**their**” club. Provide each new member with a copy of your club’s welcome package and invite them to the club for a tour.

Contact the new member and remind them that the club provides \$25.00 in coupons in appreciation of their continued support of the Air Force Club Membership program. The goal is to reward the member for transferring their membership into your club, and to get them accustomed to visiting the club regularly. The membership coupons may be used anywhere in the club either singularly or in any group of \$5 denominations, not to exceed \$25. The rules for use of the membership transfer coupons are printed on the face of each coupon. All clubs should be aggressively marketing the availability of the coupons to newly transferred members.

This process “delivers” on our promise to members for a seamless transfer of club membership. It is essential that the club staff is proactive in support of this program and that it is accurately explained to club members. NCR in Houston TX is the source for reordering the sets of five each \$5.00 Membership Transfer Coupons. The only cost to the base clubs is for shipping. Order membership transfer coupons from:

NCR Corporation
Attn: Christine Gibbs
10665 Richmond St., Suite 150
Houston, TX 77042

Phone: (713) 787-7290
FAX: (713) 787-7292